

Message Text

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SUBJECT: QUARTERLY MEAT REPORT (13-C)

1. ESTIMATED BONELESS BEEF SHIPMENTS SUBJECT PL 88-482 IN
THOUSAND POUNDS FOR 1976 BY QUARTER FOLLOW:

FIRST	SECOND	THIRD	FOURTH	TOTAL
11,300	8,500	8,528	18,000	46,328

IN OCTOBER FIRST MONTH OF FOURTH QUARTER, MEXICO SHIPPED
5,219 THOUSAND POUNDS INCLUDING 720 THOUSAND OF MAQUILA
BEEF. FIRST WEEK OF NOVEMBER SHIPMENTS TOTALED 1,504
THOUSAND POUNDS OF MEXICAN BEEF EXCLUSIVELY. IF THE CUR-
RENT RATE CONTINUES THROUGH THE BALANCE OF 1976, SHIPMENTS
WILL TOTAL 46,328 THOUSAND POUNDS. HOWEVER, TRADE SOURCES
ARE OPTIMISTIC AND BELIEVE MEXICO WILL SHIP THEIR ADJUSTED
QUOTA OF 52.0 MILLION POUNDS. THE RECENT REDUCTION IN THE
EXPORT TAX FROM 18 TO 5 PERCENT SHOULD ALSO ENCOURAGE
HIGHER EXPORTS.

2. NUMBERS CATTLE (1,000 HEAD)

	1975	1976	1977
ON FARMS	28,700	29,800	30,000
SLAUGHTER	5,387	5,617	5,841

SUPPLY AND DEMAND (1,000 METRIC TONS CWE)

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A) SUPPLY 1975 1976 1977

PRODUCTION	889	955	1,034
IMPORTS	NIL	NIL	NIL
TOTAL	889	955	1,034

B) DISAPPEARANCE

DOMESTIC	875	934	1,007
EXPORTS			
BONE IN	NIL	NIL	NIL
BONELESS IN CWT	14	21	27

EXPORTS 1977 (BY QUARTERS TO U.S., 1,000 POUNDS)

FIRST	SECOND	THIRD	FOURTH	TOTAL
20,000	12,000	8,000	20,000	60,000

3. THE SECOND FLOTATION OF THE PESO OCTOBER 27 FURTHER CLOUDS EXPORT ESTIMATES FOR THE BALANCE OF 1976 AS WELL AS PROJECTION FOR 1977. UNLESS THERE IS A SHARP CHANGE IN GOM POLICY, MEXICAN BEEF EXPORTS FOR 1977 WILL BE LIMITED BY THE INTERNAL QUOTA WHICH WE EXPECT TO REMAIN AT OR NEAR THE 60.0 MILLION POUND LEVEL (SEE FASTO CIRC 415, OCT 5, 1976.)

CONTACTS IN THE BANCO RURAL EXPECT DOMESTIC CATTLE PRICES AND BEEF TO INCREASE SHARPLY, IN WHICH CASE GOM POLICY HAS BEEN TO LIMIT EXPORTS. IT IS POSSIBLE BUT NOT LIKELY GOM WILL REDUCE THEIR INTERNAL QUOTA FROM THE ANTICIPATED 60.0 MILLION POUNDS FOR 1977.

4. MAQUILA SLAUGHTER MAY HAVE SELF-DESTRUCTED WITH THE SECOND FLOTATION OF THE PESO. MEXICAN BONING CATTLE AT 6.50/7.50 PESOS PER KILO (\$11.81/\$13.63 PER 100 POUNDS) ARE WELL UNDER COMPARABLE US CATTLE. HOWEVER, THE PRICE OF MEXICAN BONING CATTLE COULD WORK UP DUE TO SELL OFF AND WITH THE ADVENT OF THE PASTURE SEASON DURING THE THIRD QUARTER OF 1977, MAQUILA SLAUGHTER COULD COME IN TO PLAY AGAIN. HOWEVER, THIS WILL DEPEND ON US CATTLE PRICES AND US PRICES FOR IMPORTED BONELESS BEEF. CALDERHEAD

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